

## SEARCH PAYMENTS/TRANSFER PAYMENTS

### Introduction

This section of the document will show how an authorized user can search for payments and view their status. You will be able to view processed and cancelled payments by confirmation number, payment method or date range. It is also possible to transfer payments from one of your assigned employer account to another, if you realize that a payment has been made to the wrong employer account. The payment can be transferred irrespective of processing status, as long as the 'transfer from' and 'transfer to' employers are assigned to your TPA account with the appropriate payment roles.

### Step-by-Step Instructions:

1. Navigate to the payment home page using the instructions provided in the section – 'Navigating to payments'.
2. Click on the link 'Search Payments'. The following page will appear. Enter your search criteria and click on 'Search'.

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- Cancel Payments
- Review Employer Accounts
- Search Payments**
- Payment Options

Searches

User Maintenance

**Third Party Administrator**

TPA ID: 10C TPA Name: XXXXXX

**Search Payments**

Confirmation Number:  Method:

Min \$:  Max \$:

Status:

Transaction Date: From:  To:

[Search](#) [Reset](#) [Home](#)

3. The search results will appear as shown below. Click on the confirmation number to view additional payment details.

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**Third Party Administrator**

TPA ID: 10C TPA Name: XXXXXX

**Search Payments**

Confirmation Number:  Method:

Min \$:  Max \$:

Status:

Transaction Date: From:  To:

[Search](#) [Reset](#)

**Search Results**

Confirmation Number	Deposit Number	Transaction Date	Method	Status	Amount
<a href="#">500174465</a>		11/20/2009	ACH Debit	Submitted	\$100.00

[Home](#)

Click here to view payment details.

4. The payment details will appear as shown below. Click on the employer account number to view additional payment detail from within the employer account.

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**Third Party Administrator**

TPA ID: 100 TPA Name: XXXXXX

**Payment Detail**

Confirmation Number: 500174465 Transaction Date: 11/20/2009

Payer ID: 100051 Payer Type: Agent

Payment Method: ACH Debit Status: Submitted

Payment Amount: \$100.00 Items in Payment: 1

**Employer Payment Items**

Employer Account Number	Employer Name	Amount
<a href="#">10004344</a>	Employer	\$100.00

Click here to view additional details /transfer this payment.

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5. **Transfer Payment:** Follow steps 1 through 4. The employer account from where you are viewing the payment details will default as the 'transfer from' employer account. Click on the 'Transfer' button.

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**Third Party Administrator**

TPA ID: 100 TPA Name: XXXXXX

**Employer Information** [Change Employer](#) [Leave Employer](#)

Employer Account Number: 1000 Employer Name: Employer

**Payment Detail**

Confirmation Number	Receipt Date	Posting Date	Method	Description	Amount
500174465	11/20/2009		ACH Debit	Account XXXX0789900 Paid by Agent	\$100.00

[Transfer](#)

**Payment Distribution**

Debt Posting Date	Sub-Account	Quarter / Year	Amount Applied
7/31/2009	UI Contributions Principal	3/2009	\$100.00
		Total	\$100.00

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6. The following page will appear. You will be able to search for the 'transfer to' employer account from here. Enter your search criteria and click on 'Search'.

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**Third Party Administrator**  
TPA ID: 100 TPA Name: XXXXXX

**Employer Information** [Change Employer](#) [Leave Employer](#)  
Employer Account Number: 100 Employer Name: Employer

**Transfer Payment To**

**Employer Search**  
Employer Account Number:  Employer Name:   
FEIN:  Phone:

- The search results will appear. Click on the employer account number to transfer you wish to transfer the payment to and click 'Next'
- The following page will appear. Enter your reason for the transfer in the 'Notes' section and click 'Submit'.

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**Third Party Administrator**  
TPA ID: 100 TPA Name: XXXXXX

**Employer Information** [Change Employer](#) [Leave Employer](#)  
Employer Account Number: 1000 Employer Name: Employer

**Transfer Payments From**

Confirmation Number	Employer Account Number	Employer Name	Payment Date	Payment Method	Payment Amount
500174465	100	Employer	11/20/2009	ACH Debit	\$100.00

**Transfer Payment To**

Employer Account Number	Employer Name
100	052808

**Notes**

- The following confirmation will appear, indicating that the transfer is complete.

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**Third Party Administrator**  
TPA ID: 100 TPA Name: XXXXXX

**Employer Information** [Change Employer](#) [Leave Employer](#)  
Employer Account Number: 100 Employer Name: Employer

**Payment Transferred**  
Employer Payment #500174465 for \$100.00 has been transferred from Employer Account Number 100 to Employer Account Number 1000.